Session 8: Module 3 - Appointments Tab

SCRIPT

Description	Text
1. Introduction	**Welcome** to M-SPIRIT **Session 8, Module 3**, of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. Start	Appointments Tab
3. <tab>	In this module, we are going to take a look at the Appointments tab for the Cookie family.
	Click the Show Details button.
4. <tab1>	Did you remember from an earlier module that the Next Appointment scheduled displays in the Show Details section of the Participant/Search List screen?
	The appointment displays regardless of where the appointment is scheduled.
	If a participant has an appointment scheduled at another clinic or another agency's clinic, the appointment will continue to display…
	...since appointments do not delete when participants transfer between clinics or agencies.
	Let's click on Mama.
5. <tab2>	Let's open Mama's folder.
6. <tab3>	Click the Appointments tab.
7. <tab4>	The Appointments tab is a household level tab…
	...which means it displays any appointments scheduled for members of the household…
	...regardless of whose participant folder you have opened.
8. <tab5>	The grid is sorted in descending order by appointment date and time.
	It displays the member's name, the ID and name of the clinic where the appointment is scheduled, the resource the appointment was scheduled under, the date and time of the appointment, the appointment type, and if it were a group class, the topic.
	Let's click to the right of the scroll bar to view the rest of the grid.
9. <tab6>	The second half of the grid displays the Language selected in the AdditionalInfo2 tab of the Demographics tab, the Requested Date, which is the date the appointment was scheduled in M-SPIRIT, and a checkbox that indicates whether the appointment was kept.
	This grid is display only.
	The Kept indicator cannot be updated on this screen.

Session 8: Module 3 - Appointments Tab	
SCRIPT	
Description	**Text**
	It is applied when a participant is checked in or on the View Appointment for Date screen, which we will review in the next module.
	The Appointment Comment is the comment we wrote when we scheduled the appointment.
	Notice that the comment is truncated after 25 characters.
	To view the rest of the comment, we have to click and drag on the column header's right divider.
	Click on the column divider and we'll drag it to the right.
10. <tab7>	<no script>
11. <tab8>	So, just remember that despite the Comments text field in the Schedule Appointments screen allowing an unlimited number of characters, the display is limited by the size of the grid.
	Go ahead and click on the column divider again and we will drag it back to position.
12. <tab9>	<no script>
13. <tab10>	The next two columns are Follow-up and Follow-up Comments, which we will show you again once we review the View Appointments for Date function.
	The last column is Missed, which stands for Missed Appointment Reminder Letter Produced.
	Again, we will take a look at this column once we produce a missed appointment notice.
	At this point, we just need to recognize that the Missed column is not an indicator for whether the participant attended the appointment…
	…because that is already indicated by the Kept column.
	Let's click to the left of the scroll bar.
14. <tab11>	When the tab is first opened, it automatically displays all appointments for the household that are scheduled at our agency for the current date or future dates.
	The View All button shows any historical appointments that have been scheduled up to 60 days in the past.
	Go ahead and click the button.
15. <tab12>	Since today is 12/4, the tab will only display the appointment scheduled for 12/3 once the View All button is clicked.
	Let's click the Print Schedule button.

Session 8: Module 3 - Appointments Tab

SCRIPT

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16. <tab13>	We can print a schedule for all of the members of the household or just the currently highlighted participant, which is the default selection when the Generate Participant Appointment Schedule window opens.
	Since Ginger is highlighted, we'll print a schedule for her.
	We have to define a date range, so click the From drop-down arrow.
17. <tab14>	Despite this requirement, the schedule prints all of the participant's appointments, whether displayed or not.
	So, go ahead and click the Today button since it doesn't affect what prints.
18. <tab15>	Now click the To drop-down arrow...
19. <tab16>	...and click the Today button again.
20. <tab17>	Click the OK button to send the schedule to the printer.
21. <tab18>	The Participant Appointment Schedule Report prints all appointments…
	...and lists all of the same information displayed in the grid in the Appointments Tab.
22. <tab19>	This time, let's print the schedule for all household participants.
	Click the Print Schedule button again.
23. <tab20>	Select the All Members of Current Household radio button.
24. <tab21>	Click the From drop-down arrow…
25. <tab22>	...and click Today.
26. <tab23>	Click the To drop-down arrow…
27. <tab24>	...and click the Today button again.
28. <tab25>	Click OK…
29. <tab26>	…and all of the historical and future appointments are listed.
30. <tab27>	The Print Appointment Notice button prints the same appointment letter we are able to print from the Schedule Appointments screen.
	Go ahead and click the button.
31. <tab28>	Again, it will generate the letter for the participant that is highlighted in the screen, even if the appointment is in the past.
	Click OK.
32. <tab29>	
	The Print Appointment Notice function doesn't have any validation. It simply prints a letter reiterating appointment information for whichever appointment is highlighted in the grid.
33. <tab30>	We can also reschedule an appointment from this tab.

Session 8: Module 3 - Appointments Tab	
SCRIPT	
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	Appointments can be rescheduled regardless of the date of the original appointment…
	...which means we can reschedule appointments originally scheduled for a date in the past and also those scheduled for future dates.
	Let's reschedule Ginger's 12/3 appointment.
	Since it's already highlighted, click the Reschedule Appointments button.
34. <tab31>	As always, before the scheduling screen opens, we have to select the Schedule Appointment button.
	Press the Enter key or click the button.
35. <tab32>	The Reschedule Appointments for Household looks very similar to the Schedule Appointments screen.
	Let's reschedule Ginger's appointment for 12/9.
	Click on the 9th.
36. <tab33>	<no script>
37. <tab34>	The Original Appointment Information displays above the rest of the appointment information, including the…
	...Clinic, WIC Category, Date, Time and Resource.
	The appointment information such as Clinic, Member, Appt Type, and Duration also default based on the appointment being rescheduled.
	The Contact Type defaults to In person again.
	Let's select By phone since we are rescheduling, which is most often performed over the phone.
38. <tab35>	The exact same process is used to reschedule an appointment.
	Simply double-click, or single click and click OK, on the time slot when we want the appointment to start.
	Let's reschedule Ginger for 11:30 under Resource WIC 1 BM.
	Double-click on the time slot.
39. <tab36>	The confirmation screen verifies that we want to reschedule Ginger From 12/3 at 2 to 2/9 at 11:30.
	Again, we are able to print the appointment notice at this time if we want to, which we don't.
	To complete the confirmation, press the Enter key or click OK.
40. <tab37>	What if we wanted to reschedule someone else in the household right now? Could we?

Session 8: Module 3 - Appointments Tab	
SCRIPT	
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	It looks like we can since all of the fields are enabled, so let's see what happens.
	Go ahead and select Sugar from the Member drop-down.
41. <tab38>	<no script>
42. <tab39>	<no script>
43. <tab40>	If we try to reschedule another member, the following message displays:
	Could not locate an Appointment for the Member chosen.
	Click OK.
44. <tab41>	So, what did that message mean?
	Well, there are two processes that occur when an appointment is rescheduled.
	Remember, before we clicked the Reschedule Appt button, we identified the appointment we wanted to reschedule by selecting it in the grid in the Appointments tab.
	Although in this case, Ginger's appointment was already highlighted in the grid.
	However, that step is essential…
	...in order for the system to know which appointment it is going to DELETE from all screens on which it is currently displayed once the appointment has been rescheduled.
	So the two processes are deletion of the "old" appointment and the scheduling of a new appointment.
	The message is simply indicating that it doesn't know which appointment it is supposed to delete if another appointment is rescheduled.
	This means that for all intents and purposes, we can really only reschedule one appointment at a time.
	Click the Close button.
45. <tab42>	Ginger's new appointment has been added to the Appointments tab grid.
	Since the screen has refreshed, the 12/3 appointment won't show until we click the View All button again.
	Go ahead and click the button so we can see that it was actually deleted.
46. <tab43>	In general, it is probably a good rule of thumb NOT to reschedule appointments scheduled for a past date.

Session 8: Module 3 - Appointments Tab	
SCRIPT	
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	Since rescheduling does delete appointments from ALL screens on which they appear and this may impact stats regarding total number of appointments scheduled and no-shows.
	The last function is Delete Appointment...
	...which allows us to remove an appointment from the appointment schedule without opening the screen and having to search for it on the calendars.
	Let's delete the appointment we just rescheduled for Ginger.
	Click on Ginger's 12/14 appointment to select it.
47. <tab44>	Click the Delete Appointment button.
48. <tab45>	Click OK
49. <tab46>	The Delete Appointment button also allows us to delete appointment scheduled at other agencies.
50. <tab47>	The Scones are transferring to our agency.
	When transferring participants into your agency, it is best practice to always verify whether they have an appointment scheduled.
	How can you tell if they have an appointment?
	Right. Click Show Details.
51. <tab48>	We can see that Buttermilk has an appointment on 12/22 at 10:30.
	We can't see where the appointment is scheduled, but since he is transferring into our agency, we can assume it probably isn't at one of our clinics.
	Let's see if Cinnamon has an appointment scheduled.
52. <tab49>	Yep. On 12/22 at 11:00. Go ahead and open her folder.
53. <tab50>	<no script>
54. <tab51>	Click on the Appointments tab.
55. <tab52>	<no script>
56. <tab53>	Are you wondering why there aren't any appointments displayed?
	We mentioned earlier that appointments do not delete when participants are transferred, so why aren't they displaying?
	Remember, when the tab is first opened, it automatically displays all appointments for the household that are scheduled at our agency for the current date or future dates.
	In order to view appointments scheduled at another agency, we have to click the View All button. Go ahead.

Session 8: Module 3 - Appointments Tab	
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57. <tab54>	Now that we can see the appointments, we can tell that they are scheduled at another agency.
58. Best Practice	It is a best practice to ALWAYS DELETE appointments scheduled at another agency when a participant transfers from that agency to your agency.
	This deletes the appointment from the other agency's appointment schedule, ensuring that the no-show rate won't be inadvertently inflated by participants who have transferred out of an agency and that those appointments will be made available for other participants actually receiving services from that agency.
59. <tab55>	So let's delete these appointments.
	Even though we haven't transferred Buttermilk into our agency yet, we can still delete his appointment.
	Go ahead and delete both Buttermilk's and Cinnamon's appointments.
60. <tab56>	<no script>
61. <tab57>	Since the screen automatically refreshed when the appointment was deleted, it reverted back to its original display.
	Click the View All button again.
62. <tab58>	<no script>
63. <tab59>	<no script>
64. <tab60>	Let's click the View All button one more time to ensure that there are no longer any appointments scheduled.
65. <tab61>	<no script>
66. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.